

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: [REDACTED]

Position: Financial Management Specialist, GS-0501-12

Organization: BR3B

Main Appraiser [REDACTED]

Date Developed: [REDACTED]

Date Issued: [REDACTED]

Critical Element: Customer Relations(15%)**Description:**

| Derived From | General Measure | Specific Measure | Standards/Exception | | | | | Feedback Source For Monitoring |
|--|---------------------|-----------------------|--|--|--|--|---|---|
| | | | Level 1 | Level 2 | Level3 | Level4 | Level5 | |
| Position Description (PD), GSA goals, CFO Performance Plan | Quality, Timeliness | customer satisfaction | Does not meet performance expectations as defined in Level 3 | Partially meets performance expectations as defined in Level 3 | Product(s) are satisfactory to the customer and due dates for customers are met Displays knowledge and understanding of customer's financial needs related to their operations Responds positively, effectively, and promptly to customers requests Is proactive in determining needs of the customer and participates in customer Division meetings | Meets and often exceeds performance expectations as defined in Level 3 | Meets and consistently exceeds performance expectations as defined in Level 3 | Customer Feedback, monthly staff meetings, Supervisor observations |
| Position Description (PD), GSA goals, CFO Performance Plan | Quality, Timeliness | problem resolution | Does not meet performance expectations as defined in Level 3 | Partially meets performance expectations as defined in Level 3 | Works with customers to satisfactorily resolve budgetary issues to ensure work is not negatively impacted Responds positively, effectively, and promptly to customers concerns | Meets and often exceeds performance expectations as defined in Level 3 | Meets and consistently exceeds performance expectations as defined in Level 3 | Customer Feedback Weekly Staff meetings Division reports Discussion with Supervisor |

Critical Element: Financial Analysis and Budget Reports(35%)**Description:**

| Derived From | General Measure | Specific Measure | Standards/Exception | | | | | Feedback Source For Monitoring |
|--|---------------------|--|--|--|--|--|---|---|
| | | | Level 1 | Level 2 | Level3 | Level4 | Level5 | |
| Position description (PD), GSA goals, CFO Performance Plan | Quality, Timeliness | variances are clearly understood (supported with documentation), adjusted if necessary | Does not meet performance expectations as defined in Level 3 | Partially meets performance expectations as defined in Level 3 | Reconciles budget projections with FMIS/PEGASYS reports, addresses material variances to budget within 7 calendar days after data is available Develops ad hoc reports that provide relevant data/information to assist customers in their decision making Analyzes Regional utility account information on a regular basis and provides monthly/quarterly reports to Branch Chief Identifies areas of risk and improvement Develops written processes and procedures for monitoring Regional utility accounts | Meets and often exceeds performance expectations as defined in Level 3 | Meets and consistently exceeds performance expectations as defined in Level 3 | Business Reviews, monthly staff meetings, financial system and budget tracking system reports, Supervisor observations and analysis |

Critical Element: Budget Plans, Forecasting, & Monitoring(30%)**Description:**

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order CPO P 9430.1

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6)

Position: Financial Management Specialist, GS-0501-12

Organization: BR3B

Main Appraiser (b) (6)

Date Developed: (b) (6)

Date Issued: (b) (6)

| Derived From | General Measure | Specific Measure | Standards/Exception | | | | | Feedback Source For Monitoring |
|--|---------------------|------------------|--|--|---|--|---|--|
| | | | Level 1 | Level 2 | Level3 | Level4 | Level5 | |
| Position Description (PD), GSA goals, CFO Performance Plan | Quality, Timeliness | business process | Does not meet performance expectations as defined in Level 3 | Partially meets performance expectations as defined in Level 3 | Accurately develops Budget Plan with customer Update plan with actuals within 7 days of month end close and include current customer funding needs (if beyond their allocation, note in division highlights narrative) Provides funds certification for customer division within 1 days of receiving their request and ensures fund request documents are properly coded Monitors spending in customer's org codes and researches large or unusual transactions and determine if corrections are needed | Meets and often exceeds performance expectations as defined in Level 3 | Meets and consistently exceeds performance expectations as defined in Level 3 | Business Reviews, monthly Staff meetings, financial and budget tracking reports, customer feedback, Supervisor observations and analysis |

Critical Element: Special Projects - Regional Sustainability Team(10%)

Description:

| Derived From | General Measure | Specific Measure | Standards/Exception | | | | | Feedback Source For Monitoring |
|--|----------------------|-------------------------------------|--|--|---|--|---|---|
| | | | Level 1 | Level 2 | Level3 | Level4 | Level5 | |
| Position Description (PD), GSA goals, CFO Performance Plan | Quality, Timeliness, | Budget and Financial accountability | Does not meet performance expectations as defined in Level 3 | Partially meets performance expectations as defined in Level 3 | Demonstrates ability to problem solve and complete projected accurately and timely Active member of Regional Sustainability Team providing suggestions and financial advice as necessary Continues to provide training for electronic Regional Micro Purchase request and funds certification process Provides training within 2-4 business days as requested | Meets and often exceeds performance expectations as defined in Level 3 | Meets and consistently exceeds performance expectations as defined in Level 3 | Customer feedback, supervisor observation, budget tracking and financial system reports, monthly staff meetings |

Critical Element: Teamwork(10%)

Description:

| Derived From | General Measure | Specific Measure | Standards/Exception | | | | | Feedback Source For Monitoring |
|---|---------------------|------------------|--|--|--|---|--|--|
| | | | Level 1 | Level 2 | Level3 | Level4 | Level5 | |
| Position Description, GSA goals, CFO Performance Plan | Quality, Timeliness | Teamwork | Does not meet performance expectations as defined in Level 3 | Partially meets performance expectations as defined in Level 3 | Attends all Division and Branch Staff meetings unless prior approval for absence from Branch Chief Contributes timely and accurate advice to branch members that improves the productivity of the Branch | Level 3 plus: Makes valid suggestions on improving work processes to include plans for implementation | Meets and consistently exceeds performance as defined in Level 3 plus: recommends and assists in the implementation of new or improvement of existing program agrees in the Budget Branch Mentors others associated in area of | Discussions with supervisor, Budget and Service Center |

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Date Developed: (b) (6)

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|--------------|-----------------|------------------|---------------------|---------|---|--------|--|--------------------------------|
| | | | Level 1 | Level 2 | Level3 | Level4 | Level5 | |
| | | | | | Follow through on work commitments in a timely and satisfactory manner Exhausts each level of chain of command before escalating issues to next level, with escalation done only with knowledge of preceeding level | | expertise, while maintaining personal workload | |